

How To Create A Booking



This guide shows you how to create one-time and recurring service bookings, as well as how to set the payment terms for each booking.

How To Create One-Time Service Booking



1 Click "Create New Booking"



The screenshot displays the ShareDule booking interface. At the top, a dark blue button labeled "Create New Booking" is highlighted with a red circle. Below this button are two links: "Configure Cut Off Duration" and "Configure Schedule". A date range selector shows "17 Mar 2024 - 23 Mar 2024" with navigation arrows. To the right is a "Filter Employee" dropdown menu. Below these elements is a calendar grid. The grid has columns for days of the week and dates. The first row shows "TUE 19", "WED 20", "THU 21", "FRI 22", and "SAT 23". The "FRI 22" column is highlighted in red. Below the date headers, there are two booking cards. The first card is for Wednesday, March 20th, and the second card is for Friday, March 22nd. Both cards show customer, employee, service type, and payment information.

TUE 19	WED 20	THU 21	FRI 22	SAT 23
	Customer: WarmUp Cafe... Employee: Li QuanFeng Service Type: Commerci... Payment: PAYNOW		Customer: Wen Xuan Loh Employee: WX Service Type: Aircon Main... Payment:	

2 Click to create one-time booking

Which booking are you creating?

**One-Time Booking** 

**Contract Booking** 

3 Input a customer name or contact number to view the list of existing customer info before selecting one

[Add Employee](#)

Contact Number *

Select

Type customer phone

Email *

Sub Category

Select Sub Category

Child Category

Select Child Category

Assign Employee

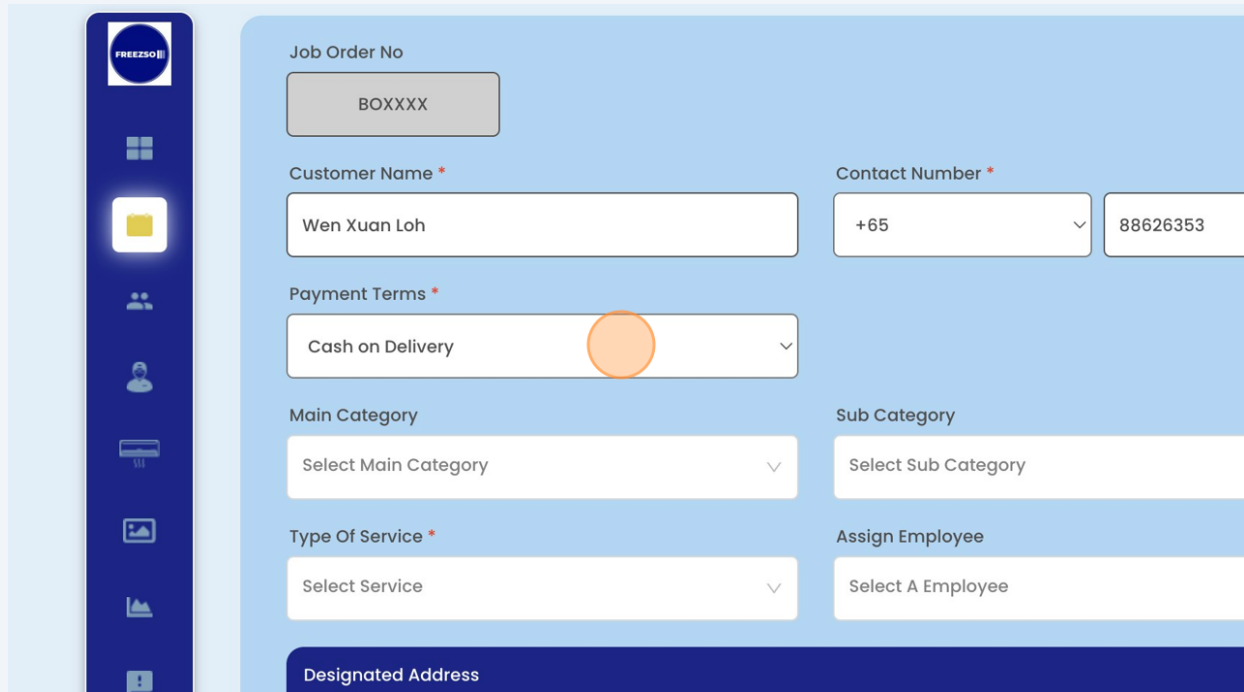
Select An Employee

Appointment Date *
22/03/2024

Time Slot *
-

4

Set payment terms for the booking here. This cannot be changed after the booking is created.



Job Order No
BOXXXX

Customer Name *
Wen Xuan Loh

Contact Number *
+65 88626353

Payment Terms *
Cash on Delivery

Main Category
Select Main Category

Sub Category
Select Sub Category

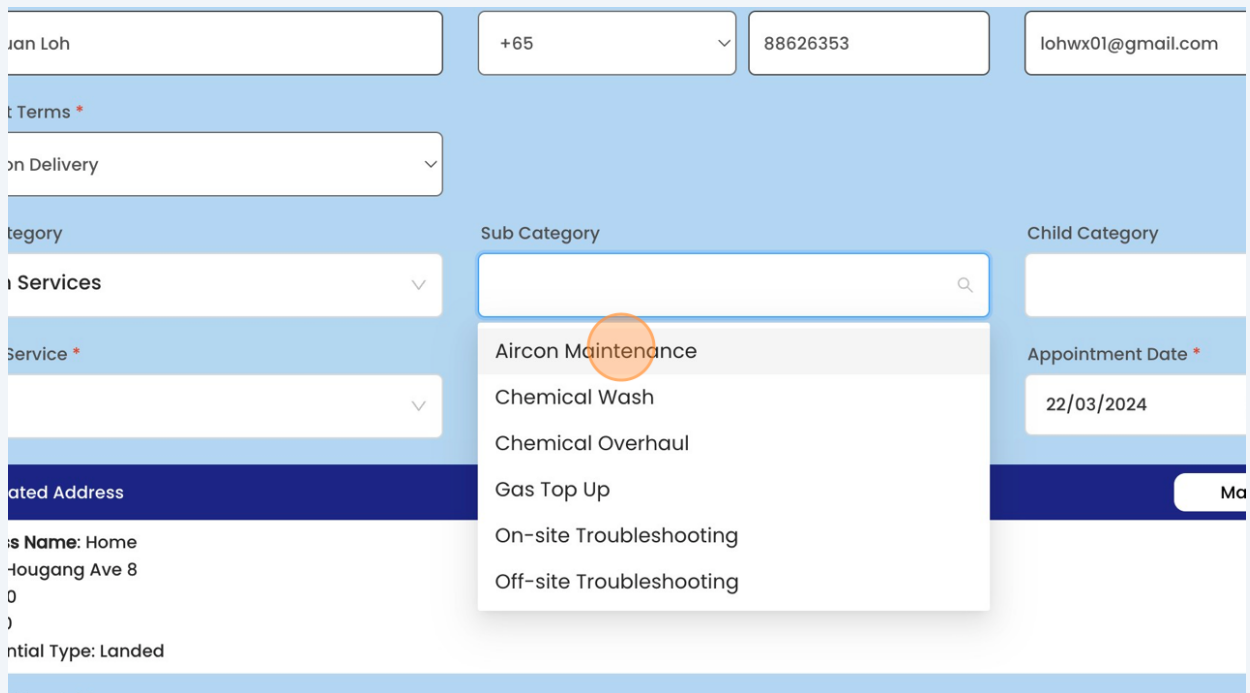
Type Of Service *
Select Service

Assign Employee
Select A Employee

Designated Address

5

Select sub category via search dropdown here.



Wen Xuan Loh +65 88626353 lohwx01@gmail.com

Payment Terms *
Cash on Delivery

Main Category
Select Main Category

Sub Category
Aircon Maintenance
Chemical Wash
Chemical Overhaul
Gas Top Up
On-site Troubleshooting
Off-site Troubleshooting

Child Category
Select Child Category

Appointment Date *
22/03/2024

Designated Address
Address Name: Home
Hougang Ave 8
0
Initial Type: Landed

6 Select child category via search dropdown here.

Category: Aircon Maintenance

Child Category: 1 Unit

Employee: A Employee

22/03/2024

Manage Designated Address

Re-Select Address

7 Select type of service via search dropdown here.

Cash on Delivery

Main Category: Aircon Services

Sub Category: Aircon Maintenance

Type Of Service: Aircon Maintenance (1 Unit)

Assign Employee: Select A Employee

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

+ Add New Address

Billing Address

8 Click here to assign an employee to the job

Terms *

Delivery

Category

Services

Sub Category

Aircon Maintenance

Child Category

1 Unit

Service *

Maintenance (1 Unit)

Assign Employee

Select A Employee

Appointment Date *

22/03/2024

Address

Name: Home

ugang Ave 8

al Type: Landed

ew Address

Manage

9 Click "10:00AM - 12:00PM"

Child Category

1 Unit

Appointment Date *

22/03/2024

Time Slot *

10:00AM - 12:00PM

12:00PM - 2:00PM

2:00PM - 4:00PM

4:00PM - 5:00PM

05:00PM - 06:00PM

07:00PM - 10:00PM

Manage

Manage Billing Address

10 Click here to add new address

Type Of Service

Assign Employee

Aircon Maintenance (1 Unit) WX

Designated Address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

+ Add New Address

Billing Address

☐ Same as designated address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: HDB

+ Add New Address

11 Click "Re-Select Address" to change the address selection for this booking

Child Category

1 Unit

Appointment Date *

22/03/2024

Time Slot *

10:00AM - 12:00PM

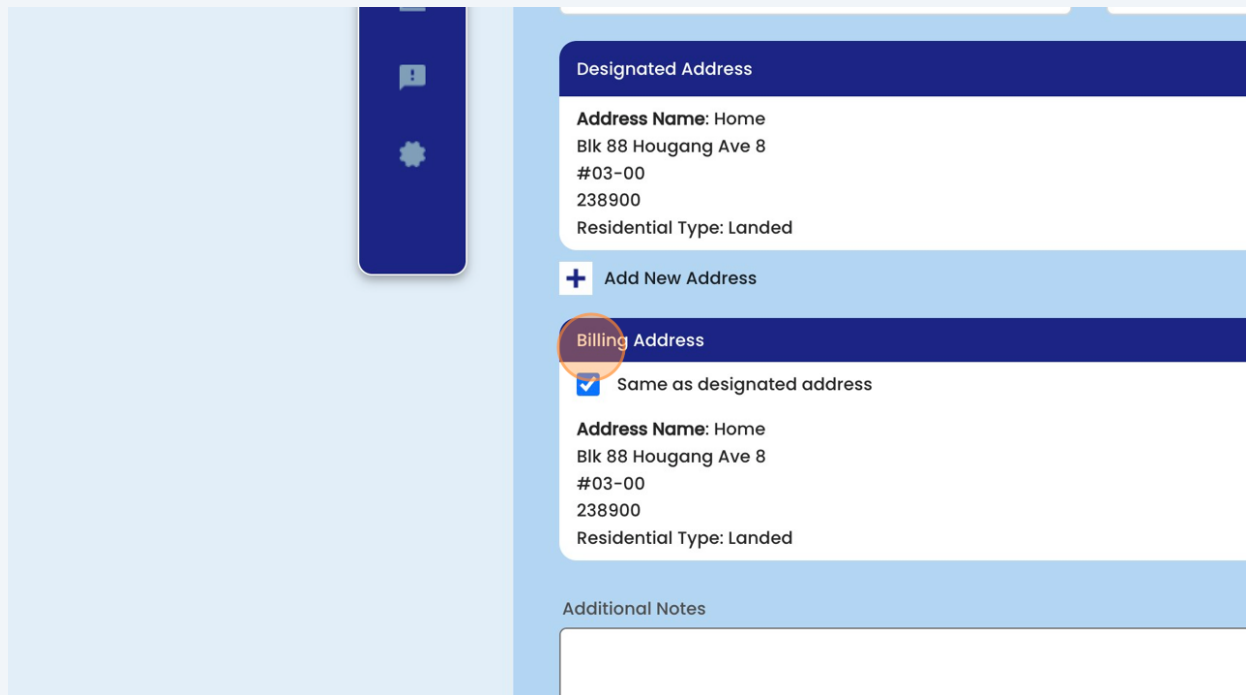
Manage Designated Address

Re-Select Address

Manage Billing Address

Re-Select Address

- 12 Click this checkbox to set the billing address to be same as designated address



The screenshot shows a user interface for managing addresses. On the left is a dark blue sidebar with a speech bubble icon and a gear icon. The main content area has a light blue background. At the top, there's a dark blue header for 'Designated Address'. Below it, the address details are listed: 'Address Name: Home', 'Blk 88 Hougang Ave 8', '#03-00', '238900', and 'Residential Type: Landed'. A light blue button with a plus icon and the text 'Add New Address' is below the designated address. Underneath is another dark blue header for 'Billing Address'. In this section, the checkbox 'Same as designated address' is checked and highlighted with a red circle. Below this, the same address details are repeated. At the bottom, there's a light blue section for 'Additional Notes' with a text input field.

Designated Address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

+ Add New Address

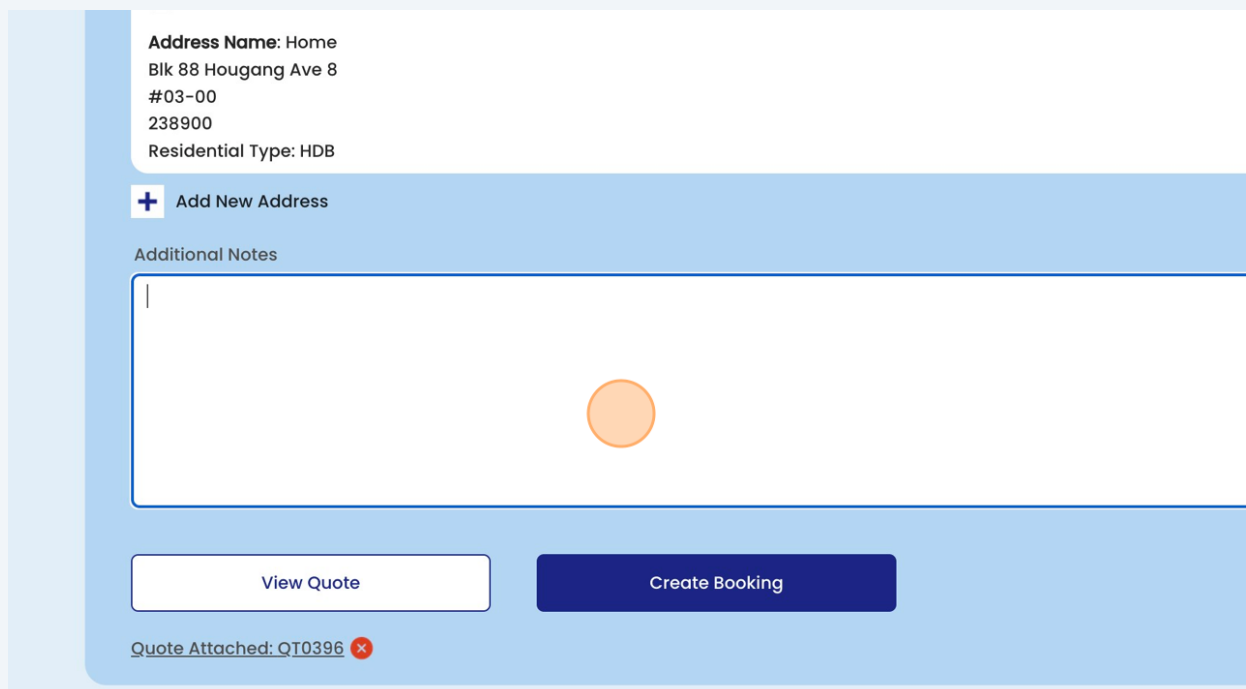
Billing Address

☒ Same as designated address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

Additional Notes

- 13 Notes from customer will be input here, this is only seen by admin.



This screenshot shows the same address management interface as the previous one, but with a different focus. The 'Additional Notes' section is now the primary focus, with a large orange circle highlighting the text input field. The address details for the designated address are still visible at the top. The 'Billing Address' section is also present, but the checkbox is not highlighted. At the bottom, there are two buttons: 'View Quote' and 'Create Booking'. Below the buttons, a status message reads 'Quote Attached: QT0396' followed by a red 'x' icon.


Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: HDB

+ Add New Address

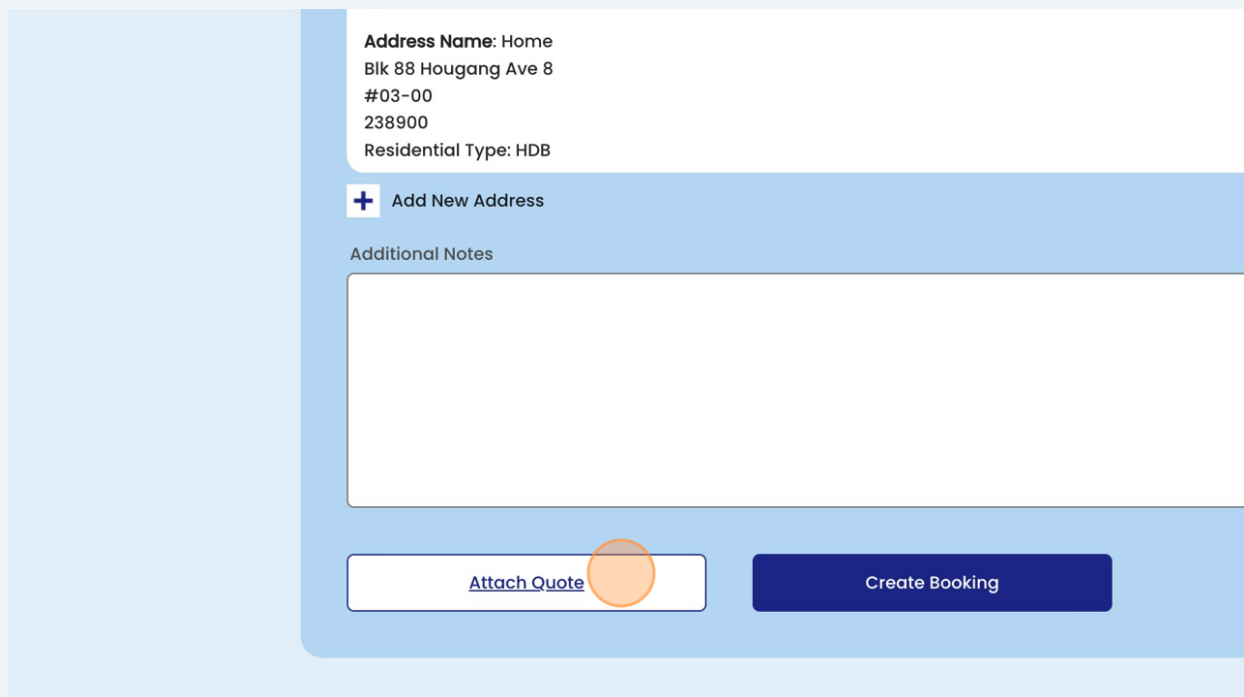
Additional Notes

View Quote

Create Booking

Quote Attached: QT0396 

14 Click to attach quote



The screenshot shows a user interface for creating a booking. On the left is a large, empty light blue rectangular area. To its right is a form with a light blue background. At the top of the form, the text 'Address Name: Home' is followed by 'Blk 88 Hougang Ave 8', '#03-00', '238900', and 'Residential Type: HDB'. Below this is a button with a plus icon and the text 'Add New Address'. Underneath is a section labeled 'Additional Notes' with a large empty text box. At the bottom of the form are two buttons: 'Attach Quote' (white with a blue border) and 'Create Booking' (solid dark blue). An orange circle is drawn over the 'Attach Quote' button.

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: HDB

+ Add New Address

Additional Notes

Attach Quote

Create Booking



All bookings will require you to attach a quote before you can create a booking. This helps the software to generate invoices automatically upon creation.

15 Click here to attach quote to booking

The screenshot shows a quote summary interface. On the left is a placeholder for a quote image. On the right, a table lists the following items:

Subtotal	\$80.00
Discount	\$0.00
Surcharge	\$ 0
Service Charge	\$2.00
Total	82.00

Below the table are two buttons: "Send Quote Details" and "Attach Quote". The "Attach Quote" button is highlighted with an orange circle. Below these buttons are links for "Download CSV" and "Download PDF".

16 Click here to create booking

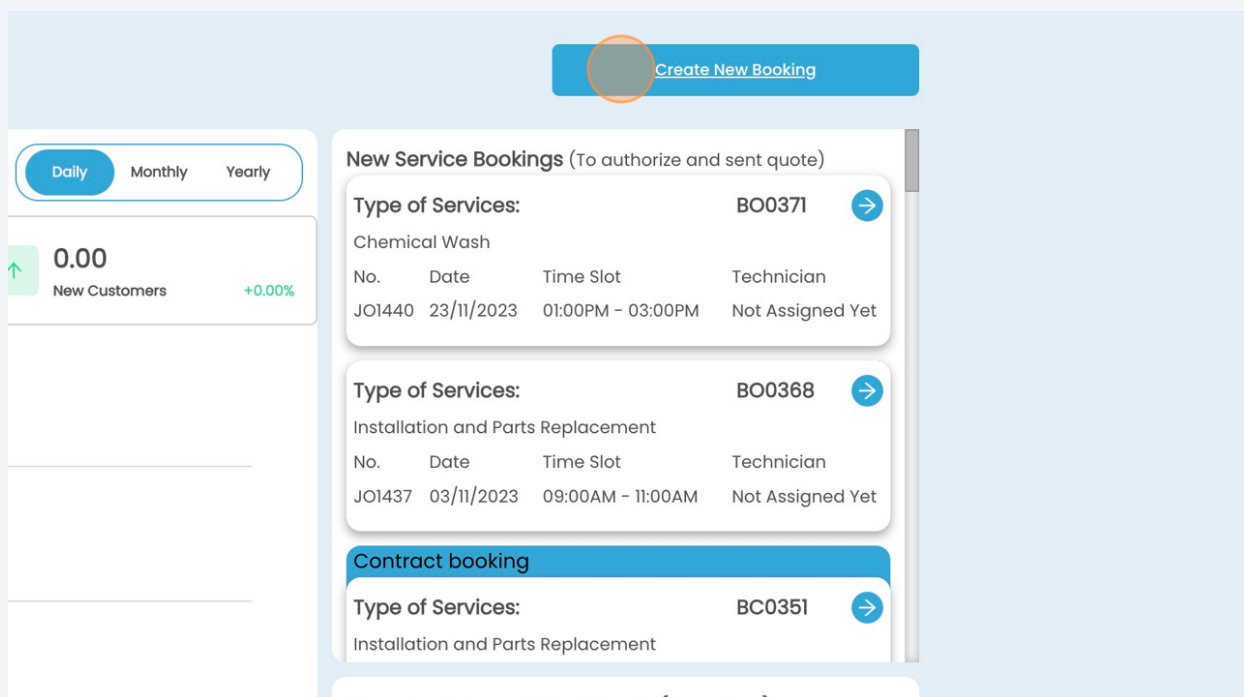
The screenshot shows a booking creation form. It includes the following fields:

- Address Name: Home
- 8 Hougang Ave 8
- 00
- 00
- Apartment Type: HDB
- Add New Address
- Additional Notes

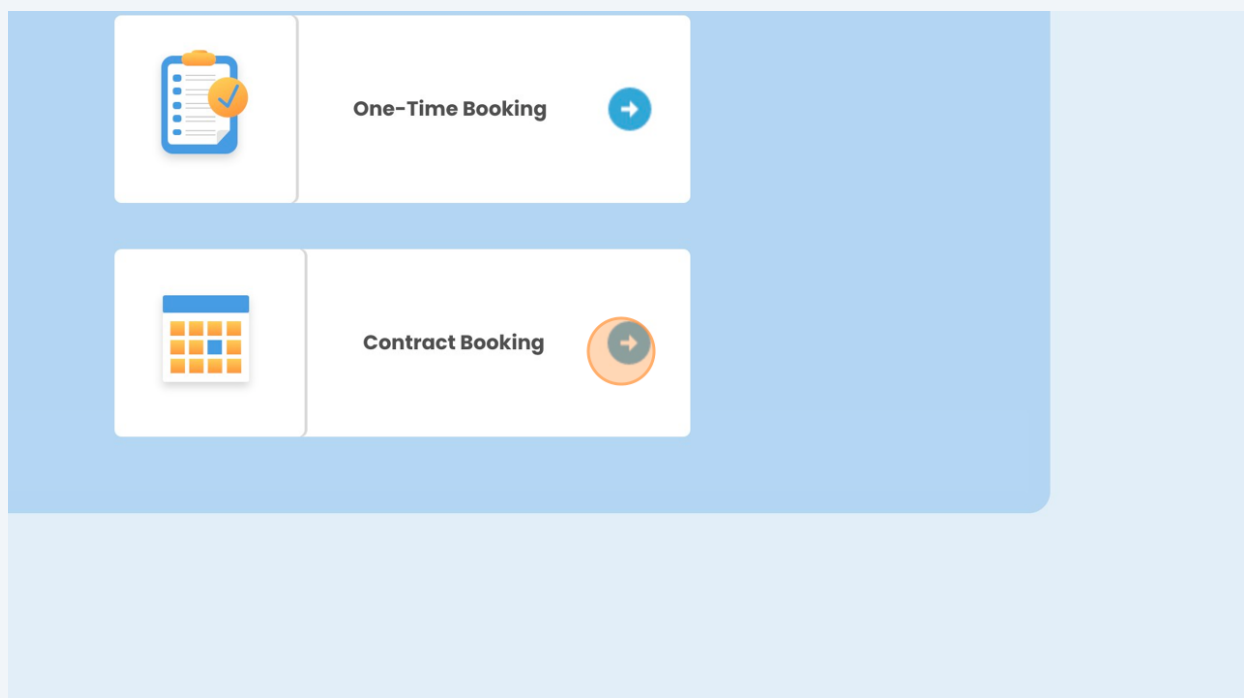
At the bottom, there are two buttons: "View Quote" and "Create Booking". The "Create Booking" button is highlighted with an orange circle. Below the buttons, there is a status message: "Attached: QT0396" with a red 'x' icon.

How To Create A Recurring/Contract Service Booking

17 Click "Create New Booking"



18 Click to create contract booking.



19

Input a customer name or contact number to view the list of existing customer info before selecting one

[Add Employee](#)

	Contact Number *		Email *
	+65	88096695	Customer Email
	Duration (Days)		
	30		
	Sub Category	Child Category	
	Select Sub Category	Select Child Category	
	Number Of Times Per Year	Contract Duration (Years)	
	4	1	



If the customer does not have an existing account in the system yet, you may proceed to fill in all customer details on the same page. The system will automatically create a new customer account upon booking creation

20 Select a main category from the search dropdown

The screenshot shows a web form for selecting a service. On the left is a dark blue sidebar with icons for home, users, profile, services, reports, and settings. The main form area has a light blue header. Under 'Payment Terms *', there is a dropdown menu set to 'Cash on Delivery'. Below this, under 'Service 1', the 'Main Category' field has a search dropdown open, showing options: 'Aircon Services' (highlighted with an orange circle), 'Sales & Purchase', 'Refrigeration Services', and 'Miscellaneous Services'. To the right, the 'Sub Category' field has a search dropdown set to 'Select Sub Category'. Below that, the 'Number Of Times Per Year' field has a text input with the value '4'.

21 Select a sub category from the search dropdown

This screenshot shows the same form as the previous one, but with more progress. The 'Main Category' dropdown is now set to 'Aircon Services'. The 'Sub Category' field has a search dropdown open, showing options: 'Aircon Maintenance' (highlighted with an orange circle), 'Chemical Wash', 'Chemical Overhaul', 'Gas Top Up', 'On-site Troubleshooting', and 'Off-site Troubleshooting'. The 'Child Category' field is empty. The 'Contract Duration' field has a text input with the value '1'. The 'Additional Notes' field is a text area with the placeholder text 'Additional Notes'.

22 Select a child category from the search dropdown

This screenshot shows a form with two main sections. The top section has a 'Sub Category' dropdown menu with 'Aircon Maintenance' selected. To its right is a 'Child Category' search dropdown, which is open and shows a list with '1 Unit' at the top, highlighted by an orange circle. Below these is a 'Number Of Times Per Year' input field containing the number '4'. The bottom section of the form is a large empty text area.

Sub Category

Aircon Maintenance

Child Category

1 Unit

1

Number Of Times Per Year

4

23 Select a service from the search dropdown

This screenshot shows a form titled 'Service 1'. On the left is a dark blue sidebar with icons for users, a person, a document, a chart, a bar chart, a speech bubble, and a gear. The main form area has a 'Main Category' dropdown with 'Aircon Services' selected. To its right is a 'Sub Category' dropdown with 'Aircon Maintenance' selected. Below these is a 'Service Name *' search dropdown, which is open and shows a list with 'Aircon Maintenance (1 Unit)' at the top, highlighted by an orange circle. To the right of the search dropdown is a 'Number Of Times Per Year' input field containing the number '4'. Below the search dropdown is a 'Notes' text area. At the bottom left of the form is a button with a plus icon and the text 'Add Type of Service'.

Service 1

Main Category

Aircon Services

Sub Category

Aircon Maintenance

Service Name *

Aircon Maintenance (1 Unit)

Number Of Times Per Year

4

Notes

+ Add Type of Service

24 Notes from customer will be input here, this is only seen by admin.

The screenshot shows a service booking form with a dark blue sidebar on the left containing icons for user, calendar, location, notes, and settings. The main form area has a light blue background. It includes dropdown menus for 'Main Category' (set to 'Aircon Services') and 'Sub Category' (set to 'Aircon Maintenance'). Below these are dropdowns for 'Service Name *' (set to 'Aircon Maintenance (1 Unit)') and a text input for 'Number Of Times Per Year' (set to '4'). A large text area for 'Additional Notes' is highlighted with an orange circle. At the bottom, there is a button with a plus icon and the text 'Add Type of Service'.

25 Click here to add another service to the booking

This screenshot shows the same service booking form, but with the 'Additional Notes' field expanded. Below the notes field, the 'Add Type of Service' button, which has a plus icon, is highlighted with an orange circle. Below this button is a section titled 'Designated Address' in a dark blue header. The address details listed are: 'Address Name: Home', 'Blk 88 Hougang Ave 8', '#03-00', '238900', and 'Residential Type: Landed'. At the bottom of this section is another button with a plus icon and the text 'Add New Address'.

26 Click "Re-Select Address" to change the address selection for this booking

The screenshot shows two sections: 'Manage Designated Address' and 'Manage Billing Address'. Each section has a 'Re-Select Address' link. The 'Re-Select Address' link in the 'Manage Designated Address' section is highlighted with an orange circle.

27 Click here to add new address

The screenshot shows the 'Add New Address' section. It includes a 'Designated Address' section with the following details: Address Name: Home, Blk 88 Hougang Ave 8, #03-00, 238900, Residential Type: Landed. Below this is an 'Add New Address' link highlighted with an orange circle. Below that is a 'Billing Address' section with a checkbox 'Same as designated address' and the following details: Address Name: Home, Blk 88 Hougang Ave 8, #03-00, 238900, Residential Type: HDB. At the bottom is another 'Add New Address' link.

28 Click this checkbox to set the billing address to be same as designated address

Designated Address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

+ Add New Address

Billing Address

☒ Same as designated address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

Attach Quote

29 Click here to attach quote

#03-00
238900
Residential Type: Landed

+ Add New Address

Billing Address

☐ Same as designated address

Address Name: Home
Blk 88 Hougang Ave 8
#03-00
238900
Residential Type: Landed

+ Add New Address

Attach Quote



All bookings will require you to attach a quote before you can create a booking. This helps the software to generate invoices automatically upon creation.

30

Click here to attach quote to booking

The screenshot shows a booking interface with a light blue background. On the left, there is a white rectangular area representing a quote attachment. To the right of this area is a summary table with the following items:

Subtotal	\$320.00
Discount	\$0.00
Surcharge	\$ 0
Service Charge	\$2.00
Total	322.00

Below the table, there are three buttons: "Send Quote Details", "Download CSV OR Download PDF", and "Attach Quote". The "Attach Quote" button is highlighted with a red circle. The background of the interface is dark grey.

31

Click here to create booking

Quantity	Amount(\$)	Discount
4	80	0(%)

Create Booking

What Do Each Payment Terms Mean?

32 If payment terms is Cash On Delivery (COD):

- Technician will be immediately notified of job upon assigning
- Technician will need to collect cash/cheque upon service completion and upload a proof of payment collection (this will be reflected in the technician report)

Create New Booking

Customer Name *
Type customer name

Contact Number
Select

Payment Terms *
Cash on Delivery

Service 1

Main Category
Select Main Category

Sub Category
Select Sub Category

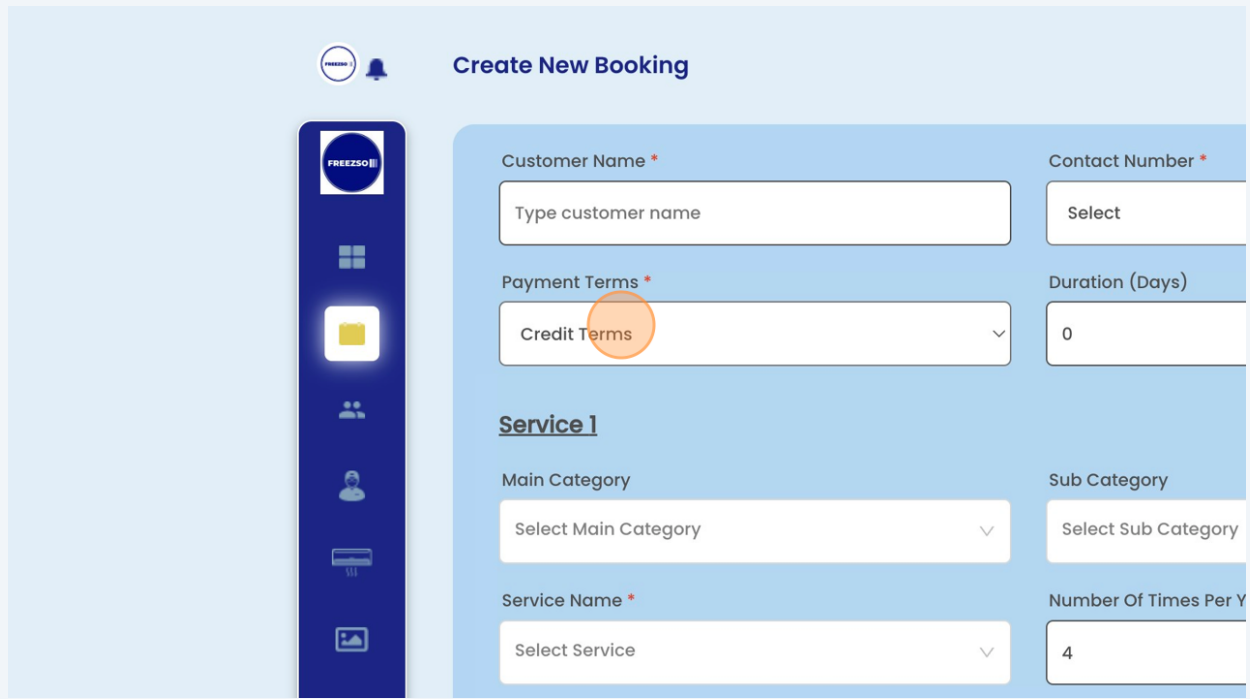
Service Name *
Select Service

Number Of Times
4

33

Credit Terms:

- Technician will be immediately notified of job upon assigning
- Technician will not need to collect any form of COD upon service completion or if a Variation Order (VO) was added on the job



Create New Booking

Customer Name *
Type customer name

Contact Number *
Select

Payment Terms *
Credit Terms

Duration (Days)
0

Service 1

Main Category
Select Main Category

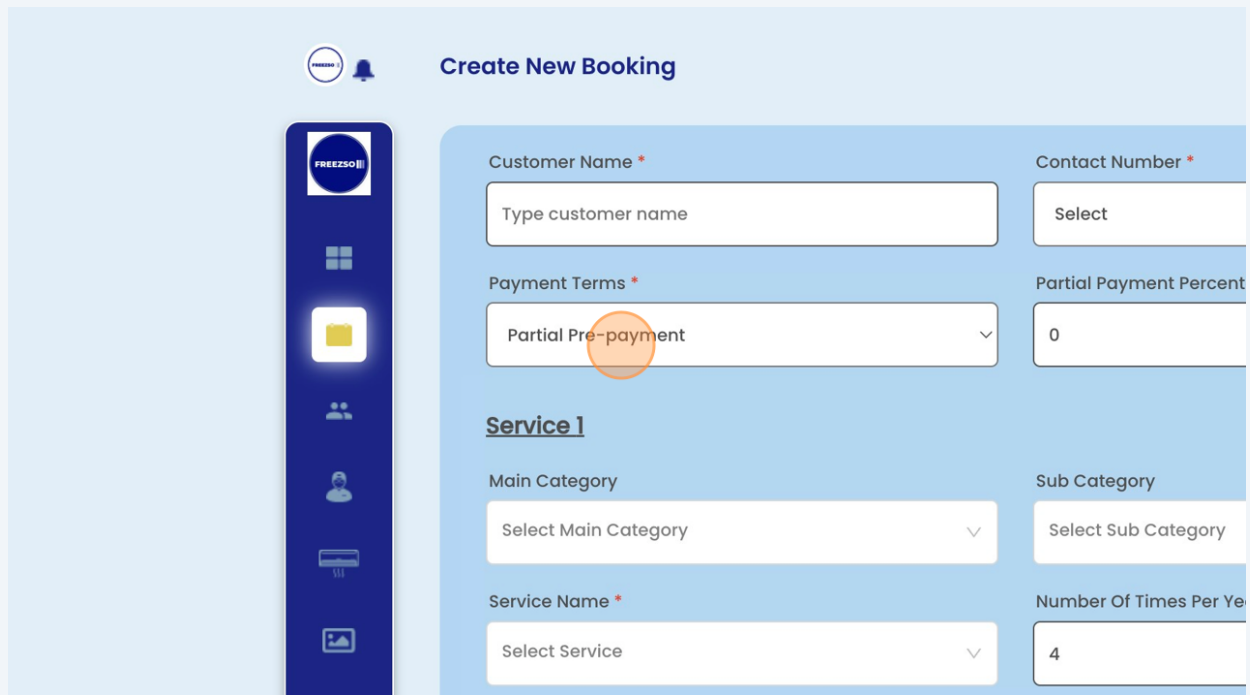
Sub Category
Select Sub Category

Service Name *
Select Service

Number Of Times Per Year
4

34 Partial Pre-payment:

- Customer will be given 24 hours to make partial payment, if not booking will be automatically cancelled (Time starts from when the payment term has been confirmed by admin)
- Admin will need to confirm partial pre-payment is made from the invoice page in order for technician to receive the job notification



Create New Booking

Customer Name *
Type customer name

Contact Number *
Select

Payment Terms *
Partial Pre-payment

Partial Payment Percent
0

Service 1

Main Category
Select Main Category

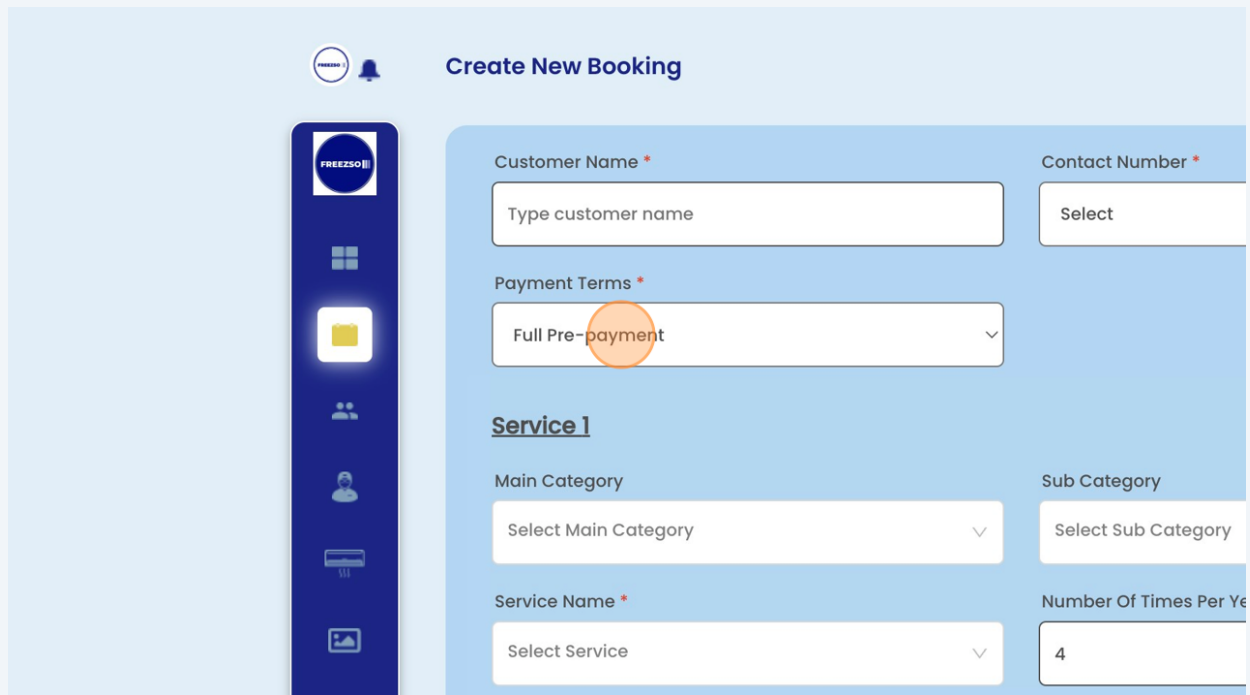
Sub Category
Select Sub Category

Service Name *
Select Service

Number Of Times Per Year
4

35 Full Pre-Payment:

- Customer will be given a certain period to make payment, if not booking will be automatically cancelled (Time starts from when the payment term has been confirmed by admin)
- The payment timeframe can be set from
- Admin will need to confirm full pre-payment is made from the invoice page in order for technician to receive the job notification



The screenshot shows the 'Create New Booking' interface. On the left is a dark blue sidebar with icons for various functions, including a calendar and a document. The main area is light blue and contains the following form fields:

- Customer Name ***: A text input field with the placeholder 'Type customer name'.
- Contact Number ***: A dropdown menu with the option 'Select'.
- Payment Terms ***: A dropdown menu with 'Full Pre-payment' selected. This option is highlighted with an orange circle.
- Service 1**: A section header for the first service.
- Main Category**: A dropdown menu with the option 'Select Main Category'.
- Sub Category**: A dropdown menu with the option 'Select Sub Category'.
- Service Name ***: A dropdown menu with the option 'Select Service'.
- Number Of Times Per Year**: A text input field with the value '4'.

36 Others:

- Technician will be immediately notified of job upon assigning

Create New Booking

Customer Name *
Type customer name

Contact Number *
Select

Payment Terms *
Others

Service 1

Main Category
Select Main Category

Sub Category
Select Sub Category

Service Name *
Select Service

Number Of Times Per Week
4

Where do I set the payment timeframe?

37 Click "Set Payment Timeframe"

The screenshot shows a software interface with a top navigation bar containing an 'Add New' button and a search bar. Below this, there are filters for dates (2-21 to 2024-03-22), service types ('All Service Types'), and services ('All Services'). Two buttons are visible: 'Term & Additional Charge' and 'Set Payment Timeframe', with the latter highlighted by an orange circle. A link 'Download CSV of full list' is also present. Below these elements is a table with columns: Date, Status, Invoice creation, and Amount. The table contains two rows of data.

	Date	Status	Invoice creation	Amount
nce (1 Unit)	22 Mar 2024	Attached		322.00
nce (1 Unit)	22 Mar 2024	Accepted	INV0283	82.00

38 Set the payment timeframe from here.

The screenshot shows a modal dialog titled 'Set the payment timeframe below.' with a close button in the top right corner. The dialog contains explanatory text and input fields for setting the timeframe. The 'Hrs' field is set to 24 and the 'Mins' field is set to 0, with an orange circle highlighting the 'Hrs' field. A 'Save' button is at the bottom. The background shows a blurred view of the same table as in the previous screenshot.

Set the payment timeframe below.

Once an invoice is generated for customer, the payment timeframe will start running for the generated invoice.

24 Hrs 0 Mins

Save



Example:

The pre-payment timeframe is set to be 24 hrs.

If admin creates a booking at 01 January 12PM, the customer will be given time till 02 January 12PM to complete pre-payment before the booking is automatically cancelled.